

# Unlock your fundraising potential

Migrating from Raiser's Edge to Salesforce



# Introduction

**Worldwide, an estimated 13,000 non-profits use Raiser's Edge – a database that has been around for more than 30 years.**

It's no surprise that it's widely been seen as **'the'** tool for fundraisers.

Purple Vision has supported clients who use RE for more than a third of the entire lifespan of the product. Over that time, we've learned a few things.

In this paper, we share some of our thoughts and insights to help you with the next steps that you are likely to take as you consider your options.

There will be a next step, because at the grand old age of 30, Blackbaud are finally upgrading Raiser's Edge to Raiser's Edge NXT.

On the face of it, for many it will feel like a natural progression. But we're urging charities to look beyond an auto-pilot upgrade, and consider their options. Here are our views on the issues at play

Purple Vision

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@purple\_vision

## The killer question

**Over the past few years, the charities we work with have repeatedly asked for our advice. Will the next version of Raiser's Edge – RE: NXT – be a good move for us? Will it do what we need it to do?**

The answer has played on our minds as our clients rely on us for our expert advice and informed opinion based on our view of the market.

Our answer, of course, depends entirely on who is asking the question – whether you're a small or large charity, what your main activity focus is, and your strategy and goals both now and in the next few years.

Our answer is also couched in the caveat that this is based on our knowledge and information about the system, the functionalities that are expected to be included information about the product roadmap for how Blackbaud may (or may not) choose to develop the product in the future.



## Time to think

Database and CRM are big decisions and investments for all organisations and the prospect of the need for change can bring people out in a cold sweat. So it's natural to want to make the most of what you have invested in already. But it is also entirely appropriate to take a step back every now and then and ensure that what you have meets your needs, and look at the plans you need to make to ensure your tools continue to meet your needs.

If you're a Raiser's Edge user, part of this process will be to look at Blackbaud's toolkit which now includes RE: NXT and the options it offers you.

But today, there are some strong alternatives in the way there weren't a few years ago, so we would also encourage you to perhaps look more widely than what you know too.

## Our response

### NXT is a natural step for [some] fundraising charities

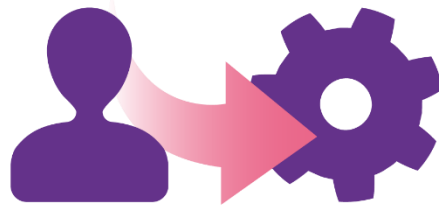
Blackbaud's major strength is fundraising. There is no one else who knows fundraising like they do. Years of accumulated knowledge and experience has been used to create products and services to meet a fundraiser's needs.

So if you are a fundraising-focused organisation, where you are currently using RE7 well and have no need to extend your requirements, then there is logic to sticking with what you have, and looking at Raiser's Edge NXT.

If you are solidly and successfully working with major donor fundraising and direct mail activities, Raiser's Edge may well be OK.

Also, if you have had issues with user-adoption – the fancy way of saying getting people to engage and use Raiser's Edge - then RE NXT could be part of the answer to your struggle.

The interface - the way information is displayed, dashboards, and the role-based views - are all designed to make for a slicker, friendlier, user experience.



### But the story is different if digital is your goal

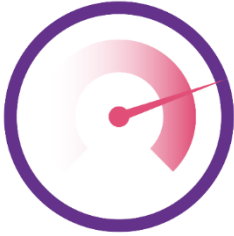
If digital is a main thrust of your strategy and goals – increased digital integration and a real 'digital first' approach – then you might need to look more closely at the detail. If you are looking for a palette of sophisticated features available remotely, then perhaps this might not be for you.

Our advice is always to make a choice based on what is a certainty and to look carefully at what remains an uncertainty or can't be pinned down (advice which to be fair applies to any system or investment decision you make).

Current plans for RE: NXT are to focus on visual functionality like views and reports. It's going to take time to get everything where they need it to be.

Your IT infrastructure will also be a part of your decision making process. Where and how do you want your teams to be working? How are you expecting them to access the tools and services you need them to?

## If you have any of these concerns, challenges or opportunities, it's time to think differently



If you're in the position of having some of these challenges or opportunities, making an automatic upgrade or conscious switch won't be your best move.

In this situation, you are at the point of needing to take a proper view at the market, not just a small slice of it.

- ▶ You are not solely focused on fundraising
- ▶ Integrating fundraising, campaigning, service delivery, operations and finance (or any combination) is important to you
- ▶ Extending your organisational reach is a goal
- ▶ Wanting a single source of data across the organisation is on your radar
- ▶ Stronger digital integration and functionality (everything from CMS, social, apps, giving platforms, comms and marketing tools for example) is a current or future requirement
- ▶ You are looking at your IT infrastructure and hosting
- ▶ You are concerned about licensing and user costs

Don't make an automatic switch if your list has any of these points on it.

RE7 and Raiser's Edge NXT may work for you – but equally, you may find something else that suits you better. Of course, you could look at other options and still decide to stay with Blackbaud (after all, RE is a solid reputable product that you are familiar with).

But taking the time to evaluate the market means your decision is more informed, more reflective of your vision, strategy and key goals, and of where you want to be in the future.

Keep in mind the Blackbaud roadmap as you look. As Blackbaud develops, they are offering more of the functionality that other providers already offer – such as Blackbaud's marketplace of add-ons and services.

This follows the success of Salesforce which already has a well-established 'online stores' – the AppExchange - rather like Google Play or the App Store.

## Where to start with your market scan

**If you're looking at your options, there are some key areas we think you'll need to look at. These will help you make a top level comparison of options and to help you decide who to talk to about your next moves.**

Make sure you have considered all the options for extending your Raiser's Edge investment in the interim, as this process should be a considered review and decision, rather than a rush. In reality, you may need to live with your existing systems for another year, while you make a choice.

Don't be afraid to ask for help from an expert advisor like Purple Vision, who can help review your requirements and recommend options for you. We always recommend what's right for you – not just tools and products you may see us promote or work with. We take pride in our independence.

### Look at the type of CRM options you have

Platform solutions are extendable – they can be grown and developed in line with your needs in a more cost effective way than static solutions can. Using the API (application programme interface) – the code – behind the product, developers can easily work with the system to configure, add and personalise according to your needs.

It depends on the complexity of your needs how successful API integrations might be to deliver what you require - if you need a few 'pings' between x and y, it could work, but if your needs are more complex API integration may not be the best way to handle this.

#### On Premise or Single-Tenant SAAS

- Costly hardware / software
- Painful and costly upgrades
- Time consuming for staff
- Slower data accessing
- No remote access



#### Multi-Tenant Cloud Computing

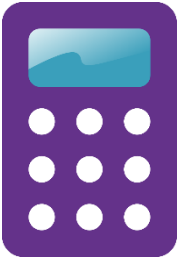
- No hardware / software
- Reliability, scalability and sustainability
- Painless and free upgrades
- Easy and agile deployment
- Access from any internet device



Platform solutions also offer a network of developers – often called an ecosystem – who know how to use the code and API to develop products and services. This means more customer choice, more 'apps' and 'add-on' services which are ready configured to 'plug in' to your system and give you the service or function that you need. Blackbaud has a marketplace of options for BCCRM, Salesforce has a whole area called the AppExchange, Dynamics has a fewer options.

Alternative options are hosted services – either held on your own premise or elsewhere. Some of the pitfalls of these types of solutions often come with a limited list of suppliers who can help you (thus increasing the costs for all services), and also a more limited roadmap for development as fewer developers are working new releases, updates and integrations.

## Look at costs



Of course, cost is a major influencer in non-profit decision making. The cost model for NXT is to be based on a subscription basis (number of records for example) rather than number of users. So if you are an organisation with many users but a relatively small database, the NXT pricing model may prove more cost-effective. The reverse of course could therefore be true, and RE: NXT does rely on Blackbaud hosting which is a cost.

## Look at your 'frustrations list'

We see many clients attempting to extend the use of their Raiser's Edge systems – principally to store and organise data and synchronise points of contact from sources beyond the traditional boundaries of fundraising – like communications, marketing, service delivery, advocacy and volunteering.

But there are many challenges to being able to achieve this including:

- ▶ Ease of Use – limited or inflexible user experience
- ▶ Lack of automation – manual data import/not automated or real time
- ▶ Expensive – cost concerns in setup and/or ongoing use
- ▶ Lack of choice – integration/use of few (or no) third party options
- ▶ Remote/mobile access – limited availability on all platforms/ devices

We all want a single source of reliable data – the elusive 360-degree view. And we think it's reasonable to expect some of these integrations to be possible with Raiser's Edge, especially if the other tools you use are open and work in a joined up way.

Will these options be available? Costly to develop in? Are they available more readily through another system?

## Look at what's held you back so far

It is important to recognise the vital difference between a database and a CRM system.

Few traditional fundraising record systems are actually CRM systems. That's not surprising as most were invented before the era of CRM. Donor databases like ThankQ, Donor Strategy and The Raiser's Edge are essentially highly featured lists of donors and gifts, whereas CRM systems like Microsoft Dynamics, Salesforce and Blackbaud CRM are technology platforms that enable you to work with a single set of data and 'best of breed' tools across your whole organisation.



Raiser's Edge simply wasn't designed in the same way as a modern cloud-based CRM platform. You can still integrate with Raiser's Edge, but you are limited in choice and it takes time and technical-know how (for which there is often a cost).

It also takes time for your teams to adopt and use the clunky way things need to be done to get your data in the right place.

## Look at your users

Customer-facing technology is often regarded as the domain of the communications or fundraising departments, but in fact you will find similar needs and frustrations in every part of an organisation.

Your colleagues in finance and operations are almost certainly struggling with the same technology blockages:

- poor data quality
- security issues
- user unfriendliness
- inadequate reporting.

And with numerous separate data systems across your organisation, these are compounded.

Do you want to solve their problems as well as your fundraising teams and get more out of your infrastructure investment? As Blackbaud specialises in fundraising there are more limited options to work with this system if you want to go down this route.



## Look at why it matters

These problems are of no interest to supporters and service users.

They live in the real world and they expect their relationship with you to be as good as those they have come to expect from Amazon, John Lewis or Expedia.

Only with a CRM platform and integrated tools can you deliver against these expectations.

Proven and affordable systems now exist that enable you to join up your whole organisation in one efficient way and avoid the limitations of old technologies.

Working with a single platform you can choose the best tools to manage volunteers, grants, retail, finance and even service delivery. All secure, accessible and synchronised. Saving time and money, empowering relationships in all places and at all times, and releasing more people to focus on your mission.

Is this a real world vision for you? We think you need to look digital first if you truly want to achieve this.



# Digital first

It's a bit of a hackneyed phrase now, isn't it? But do we really know what it means? We think it means that in order to make all your customer-facing technology tools work, your organisation has to be willing and able to adopt them.



***“Digital first” describes an organisation with the skills and attitudes necessary to operate in the digital world – where we anticipate supporters or members interacting more through social media, by email, and through the web. It also points to the commitment your organisation needs to make.***

Think about those who are already on the road to digital first – commercially as well as in the non-profit sector – such as Tate, National Trust, Age UK, MacMillan, NHS Choices, and Christian Aid. Fair enough these are big names.

But it is easier for a small agile organisation to make this change – how long before the non-profits you share space with are on this road? Where will that leave you as you compete increasingly for your share of fundraised income, through individuals, activities or even statutory sources.

## How to make digital first happen

- Digital First isn't just about developing a new digital strategy; it's about re-developing all your strategies so that they are implicitly digital. And then carrying them out.
- Digital First means listening and responding to your stakeholders every day.
- Digital First requires investment in people more than IT.
- Digital First is where it is second nature for everyone in your organisation, from the chair of trustees to the newest recruit, to work together digitally.

If you start with this approach to thinking about digital first, you will answer the question for yourself about how far you can stretch your current Raiser's Edge tools. It might suggest that you need to start thinking differently and look at new tools – but your strategy is as unique as your organisation, and so it might not.



None of this happens overnight, so contemplate just how digital you want to be. Think about whether what you use now for your technologies will help that, or will some new tools help shift the established culture and thinking in your organisation. Or whether some investment in what you've got might just be enough.

Of course, these options aren't mutually exclusive. Many organisations choose to take a stepped approach to their tools – usually starting with the user group for whom a switch will have the most impact. Typically, as income generators, that's fundraisers. But not always.

Life *after*  
**RAISERS EDGE**



# Unlock your potential with Causeview

“Take a look at this” said our CEO, Steve. “It’s like everything Raiser’s Edge **should** be for fundraisers, but on the Salesforce platform”. A flurry of questions ensued.

Not every new tool attracts our attention like Causeview. But when it does, we have a set of evaluation criteria that we go to help us decide it’s potential value to fundraisers.

The Purple Vision team has a wide skillset, so we set to reviewing with many different hats on - tech, fundraising, operations, developers, strategist, data experts, users, volunteers, marketing and comms, finance.

We look for a range of factors in a new tool, system or approach – everything from ease of integration, features and functionality, ease of ‘switch-over’ for teams in charities using one system and migrating to a new one ... the list goes on.

We also take care of the ‘due diligence’ – and look at the track record of the developers (in this case, Canadian-based, **Breakeven**), and where else the tool is in use.

We’re also keen to find out how the company who develop the tool approach everything from customer feedback and input, through to development and ongoing service.

We look at where a new tool might sit in the broad spread of offers from a wide range of providers – where are the points of difference? Who will it suit? Is there a gap in the market?

So here we are with Causeview. We think it’s key to helping non-profits unlock their fundraising potential using the Salesforce platform.



## Another CRM for fundraisers – surely there are enough of these already?

Let’s be clear, there are lots of great tools out there for fundraisers. But everything in life has limits, and the roadmap and pace of development for some CRM systems is slow and taking a while to catch up with the pace of fundraising. Some are just plain expensive. And some are suitable-*ish*, but not really ready for a digital future.



Fundraisers are working faster – and need (not want any more, just plain old need) full integration and a cohesive, no-fuss approach to data sources.

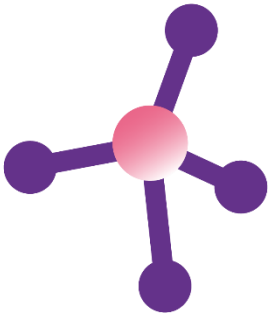
The market also needs proper, scalable platform solutions – where there is investment in the platform as well as in the solution. We say no more to systems that need replacing every 5-7 years, and yes please to systems that have regular upgrades so won’t ever date.

## Getting to the core of the issue

We're quite pragmatic at heart, and realise that it's a 'big ask' to have a tool that is everything we need, has an unlimited road map and is fantastic at everything.

It doesn't stop us asking though – if anyone deserves perfection, it's a fundraiser who is, after all, just trying to change the world.

The reality is that with today's 'platform' approach one tool doesn't have to do it all.



The option to add a range of different expert components and plugins means a whole world of different tools can be joined together without fuss to enhance the 'core' features of a system but also extend, grow and develop our fundraising operations, and can support other organisational functions, too.

So actually, we **can** have something that does do it all with Salesforce as a CRM – our platform of choice. So what's your 'core', if you're looking at an alternative to Raiser's Edge?

## Salesforce and Causeview as your 'core' choice

The Purple Vision team spent some time looking at the key features that are commonly used in fundraising, with all our different hats on.

Not all fundraising teams need all of the features. Any decent fundraising strategy is unique in its own way, and so to help deliver the plan the features of fundraising tools need to reflect this, so for some, the feature might not be useful or interesting.

So when you come to benchmark a tool like Causeview as a 'core' choice, it's possible to have what appear to be some glaring gaps for a tool.

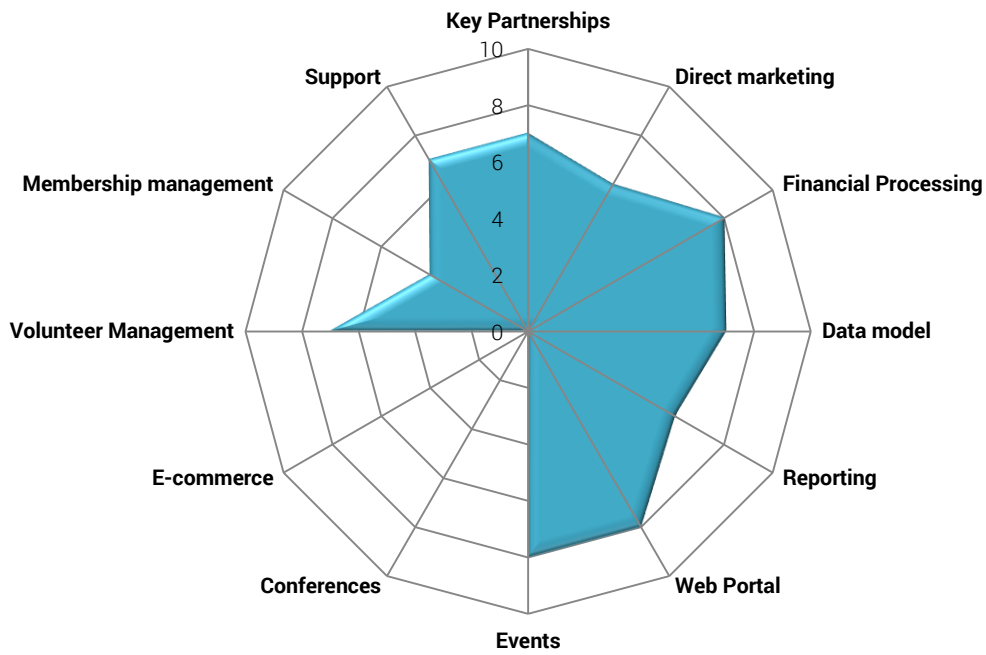
I mention this now as when you look at the things we benchmark you will inevitably see some gaps and ask some questions.

As we don't have to depend on one tool providing it all, the approach shifts. Where do we want the strengths in our tools? And what other options – like apps or plug ins – are there for us to gain a higher level of functionality if we need it?

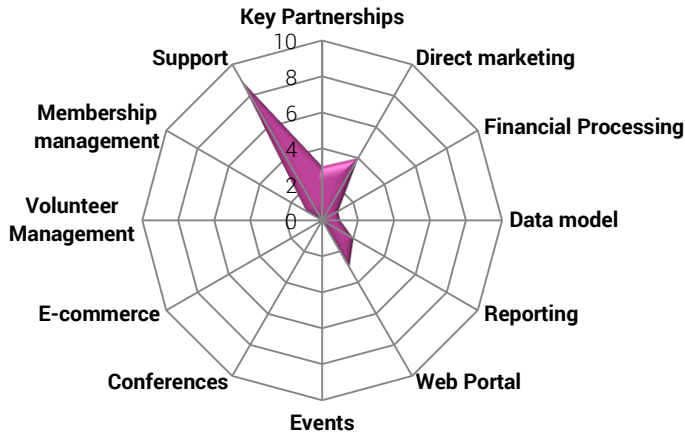
Salesforce is like a giant painter's palette – you can mix as many options as you like.



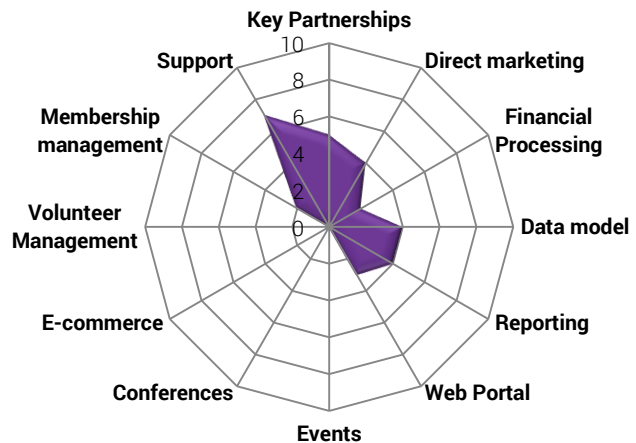
### Causeview



### Salesforce Native



### NonProfit Starter Pack



## 6 things we like about Causeview

One of the biggest things we like about Causeview is that **it is what it is**. It's not trying too hard to be something that it's not and overstep the mark and try and achieve everything. It's not a jack of all trades. Here's what else we like:



### 1 Familiarity

For organisations using Raiser's Edge and looking to migrate over to a new platform with minimum fuss, the features and approach will be really familiar. We have experienced RE users on our team who, as they explore the tool, nodded along and saw the mapping. We have Salesforce only users in the team who also thought it all made sense when explained, and we have people who have used a range of other tools, too (ThankQ, Progress, CiviCRM) – who were pleased at how quickly they were able to 'get' the tool, layout and approach.



### 2 Good, solid fundraising

The day-to-day bones of Causeview is about fundraising. Managing gifts, opportunities, major donors, batch entry processes, direct debits, gift aid, all the things you need and a data structure that will accommodate developments you might need. A logical campaign and appeals structure helps you allocate funds and keep track of all your codes.



### 3 Scale-ability

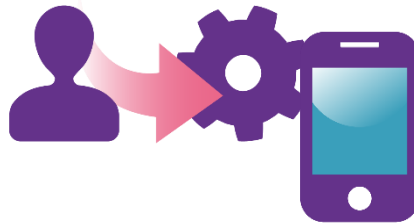
If your strategy is to double your charity in 5 years, Causeview is a robust 'heart' to help you achieve this. Not only is it scale-able by user (so as you grow you can add more licenses), but the development roadmap for the system is focused on 'onwards and upwards' too.

The approach of selecting a 'core' product and adding around it with the tools and plugins means that you're not tied to one full system and set of integrations. An example e could be the trigger at which you are ready to scale-up and include automations and digital donor journey – it is as simple as plugging in a new email service provider (if you are an acronym fan, that's ESP).



#### 4 Reportability

The dashboard features and functions allow you to create graphs and charts from any field within the tool. Reporting is real-time and easy to access – can be automatically send directly to the people who need to see key reports and is easy to 'play with' for creating new scenarios and 'what if' extrapolations. And because it's all in easy-to-use Salesforce, pretty much anybody can do these things for themselves!



#### 5 Event features

Basic event features are included with areas and elements to manage a range of event types and stages. An associated app allows you to manage guest check in at events directly into your Causeview system too. Just imagine – not having a pile of checks-ins to manually enter anymore!



#### 6 Volunteers are fundamental

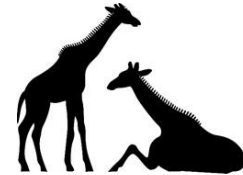
The tool offers some superb volunteering features and ways of recording hours, signing up volunteers and keeping track of and reporting on volunteering hours. All the key things you need to manage, support and run retention campaigns for your volunteers – who are after all, usually pretty fundamental to charities and what they deliver.

## Sticking our necks out

We love a bit of humour (the groan-worthy one-liner is a staple of our office). As we pondered the best way to demonstrate the system so fundraisers can see how it works 'in real life' with a charity example.

Our solution – invent our own charity so we can showcase examples under a single name and without crossing any lines or confidences. And so Giraffe Aid was born.

Giraffe Aid – our fake charity example – has taken on a bit of a life of its own now. It has a website, and a set up that has a programme, volunteers, fundraising events and a fantastic fundraising structure. If only real life was as easy as this.



**Giraffe Aid**

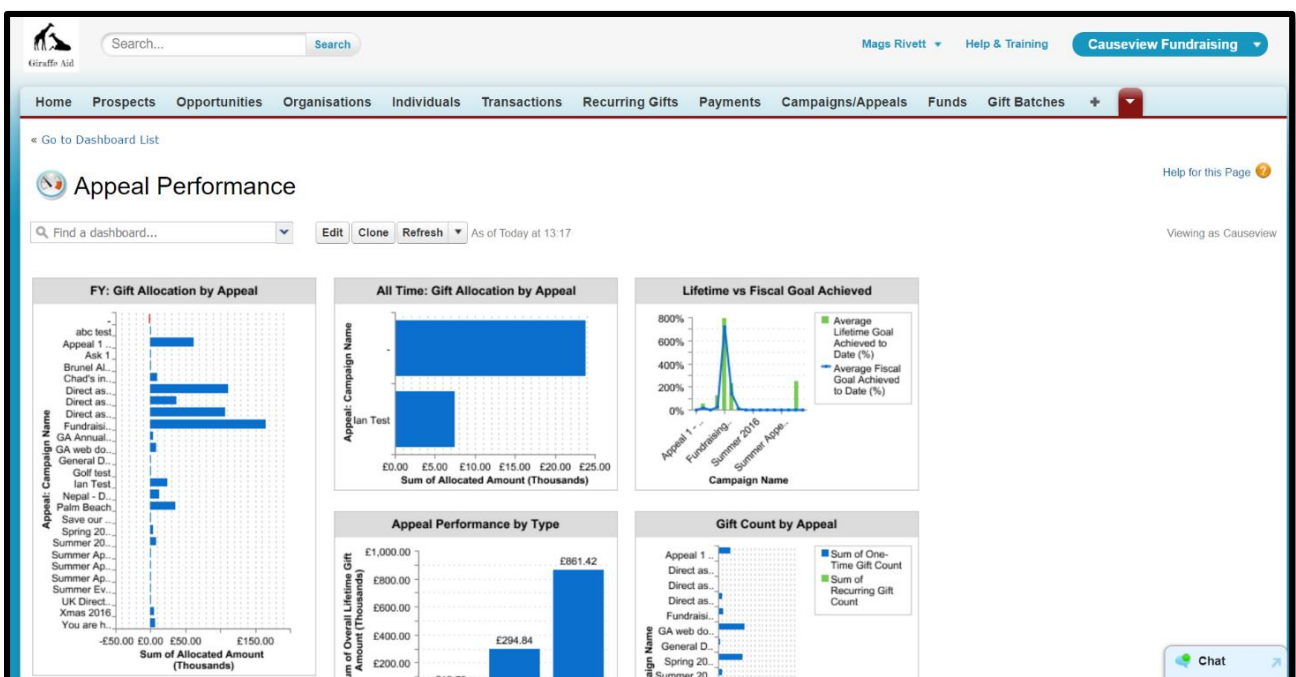
We've been able to apply all kinds of giraffe-led humour and creativity to our working day. A win-win.

All this 'fun' has had a purpose beyond making a demo a lot more interesting for a user.

- ▶ As a team we have spent a lot of time playing with the system to set it up.
- ▶ We know a lot about real-life implementation.
- ▶ We \*know\* the system as a user would.

We're better placed than ever to not only implement the system but also to support and train new users to make the most of the data and explore it more effectively.

We'll stick our necks out and say we think you'll be pleasantly surprised.





## But seriously, see for yourself

If you'd like to see Causeview for yourself, you're very welcome to join us and take a peak. Whether because you're interested to see what the fevered fundraising minds at Purple Vision have cooked up with Giraffe Aid or are seriously interested in assessing your CRM options for the next 6-12 months.

Our demonstrations will

- Explain the Salesforce platform
- Share how you can grow and expand the platform to suit your needs
- Showcase Causeview's fundraising features
- Show you how your fundraising strategy maps into a new tool
- Identify how your fundraising could improve

We run these:

- ▶ on demand – just call us and ask
- ▶ as public events – listed on our website <http://purple-vision.com/events/>
- ▶ promote via our social media feeds - @purple\_vision or via LinkedIn



To find out more about Causeview, ask us about extending the life of your Raiser's Edge system while you find out about other options, or to ask us to Signpost appropriate solutions for you, please contact:

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**Sales Director**  
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# About Purple Vision



Purple Vision are a specialist consultancy, supporting charities, associations, education providers and other non-profits to succeed with technology.

We cover key areas of CRM, digital and data.

We've been around for 13 years, and in that time have helped hundreds of non-profits with a wide range of challenges and tools.

Our background is in fundraising and technically for a long time that meant only Raiser's Edge for technology. But times have changed and so have we. We're still strongly rooted in our fundraising heritage, but are now also an advocate of other technologies.

We are a Salesforce Registered Consulting Partner, and AppExchange Partner and Salesforce Marketing Cloud Partner. We're also a Salesforce.org International Impact Partner. So, we're firm fans of the flexibility and scalability of the Salesforce platform.

But we're also independent. We work with a range of partners and providers. Most importantly for you, that means we'll only recommend what's right for you. It's one of the things that make us unique. We don't just shoe-horn your requirements into one tool or product and make it fit.

## Our Services

Our services include:

- **Health Checks** - check the status of your current Raiser's Edge or Salesforce instance and see what you can do to extend the life of your current set up.
- **Signposting** – we'll help identify the most appropriate mix of tools for your organisation, based on your stated goals, vision and strategy. We do this for CRM, digital tools for fundraising, communications, campaigning and more.
- **CRM Implementations** – from managed packages like Causeview to development of your own instance of Salesforce, we'll help you to succeed with a new CRM.
- **Support and Training** – our support and training services help with the day to day management of your CRM instance, and help your staff to get to grips with tools and new ways of working.
- **Consultancy** – our consultancy service is responsive to your needs. Whether you need a fundraising audit or are looking for advice, guidance and support on other aspects of your non-profit, our expert team are on hand to help.

## Useful resources

Check out our website – you'll find a host of useful resources. From presentations we've made through to upcoming briefings.

- ▶ **Breakfast Briefings** - Informal updates over a cuppa and a croissant, these sessions cover a vast range of topics of interest to a non-profit audience. Watch our website [www.purple-vision.com/events](http://www.purple-vision.com/events) or our social media feeds for news of our activities.
- ▶ **Presentations** - We often speak at conferences seminars and events and post our slides to share our insight and ideas via [www.purple-vision.com/presentations](http://www.purple-vision.com/presentations)
- ▶ **Whitepapers** - Our whitepapers - like this one – gather our thoughts and knowledge. They are designed to help extend knowledge, deepen understanding and support our audiences to learn about new areas of technology or fundraising, develop their skills or support them to make effective and productive decisions. Find out whitepapers via [www.purple-vision.com/whitepapers](http://www.purple-vision.com/whitepapers) and some are available in printed format on request
- ▶ **Blog** - We regularly post blogs on a host of topics. Check out our feed for insight and info and even sometimes a little light humour. You can find the link via [www.purple-vision.com/blogs](http://www.purple-vision.com/blogs)

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